Upload Location Schedules via Spreadsheet

1 On this page of the Application for New Accounts or New Location Adds, instead of clicking "+New Location" proceed to the next step.

2 Click this checkbox to Upload Locations via Spreadsheet.

Property Information
Please provide all information requested below about each individual property.*

Location Records

Location Number		Name	Street1	City	State
Upload Locations via Spreadsheet? ⓘ	☐				

Continue >

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3 Click "Download Template". This will advise you that you are leaving the page, click okay and then this will download the spreadsheet to your browser.

Download Template

Import Locations

Continue >

4 Open the spreadsheet and save as needed. Fill out the required red highlighted cells. Click the checkboxes if you want to include that column's coverage in your proposal. How you fill out each cell will determine what other cells get highlighted to prompt you to answer. You can only import 100 locations per SOV at a time. If you have more than 100 locations to import, separate them into multiple SOV's.

TIPS:

• Select the first row and use the **fill handle (+)** in the bottom left corner to drag down for the number of rows you need. This ensures all required fields are populated correctly for each location being entered.

• **Columns A-D are hidden as these are pre-filled out.** Column A : "Auto-Generate". Column B: should always be a "1". Column C will be empty. Column D: Will always say "Yes".

• If you want to update a location that was already imported into the proposal, unhide these columns and replace "Auto-Generate" in Column A with the location number that was assigned after import.

• **County Field**: Be sure to enter a **County**—this is essential for **Hazard Hub** and **Smarty Streets** to function properly. Verify the address matches or was corrected accurately once imported.

• **Occupancy Percentage**: **Do not** include a percent sign (%) when entering occupancy values.

• **Errors**: If you encounter import errors, first check column B for a 1. If that is correct, review the spreadsheet for any issues with entry. Specifically, RCV vs ACV with requested coverage, Lender Paid(remove selection and add back in location schedule), OS yes w. no coverage or OS no w coverage. We are working to get these errors to stop during import and only error on the location schedule but for now check these if you have an error. If problems persist, reach out for review.

• If some locations import successfully but other locations error, before reattempting the import, remove the locations that were successful from the SOV. If you do not, those locations will be duplicated.

5 Now click "Import Locations".

Download Template

Import Locations

Continue >

6 Click "Choose File" then select the spreadsheet you saved from your files.

Spreadsheet Import for Location Schedules

i

i   Please upload the schedule below. Make sure your updates are correct before submitting.

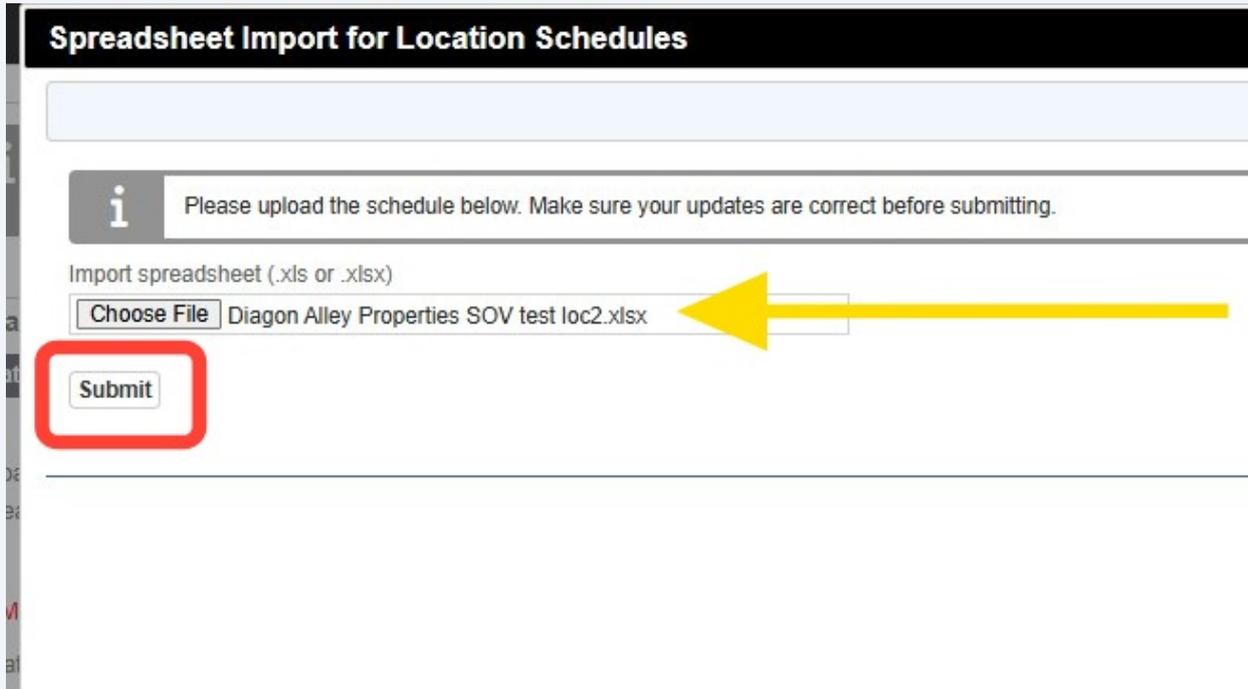Import spreadsheet (.xls or .xlsx)

Choose File   No file chosen

Submit

Loca
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7 Click "Submit" if you see your file correctly selected in the choose file box.

Spreadsheet Import for Location Schedules

i Please upload the schedule below. Make sure your updates are correct before submitting.

Import spreadsheet (.xls or .xlsx)

Choose File Diagon Alley Properties SOV test loc2.xlsx

Submit

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8 While it is working on Uploading the file it will show... "Uploading and importing... Please wait."

Spreadsheet Import for Location Schedules

i Please upload the schedule below. Make sure your updates are correct before submitting.
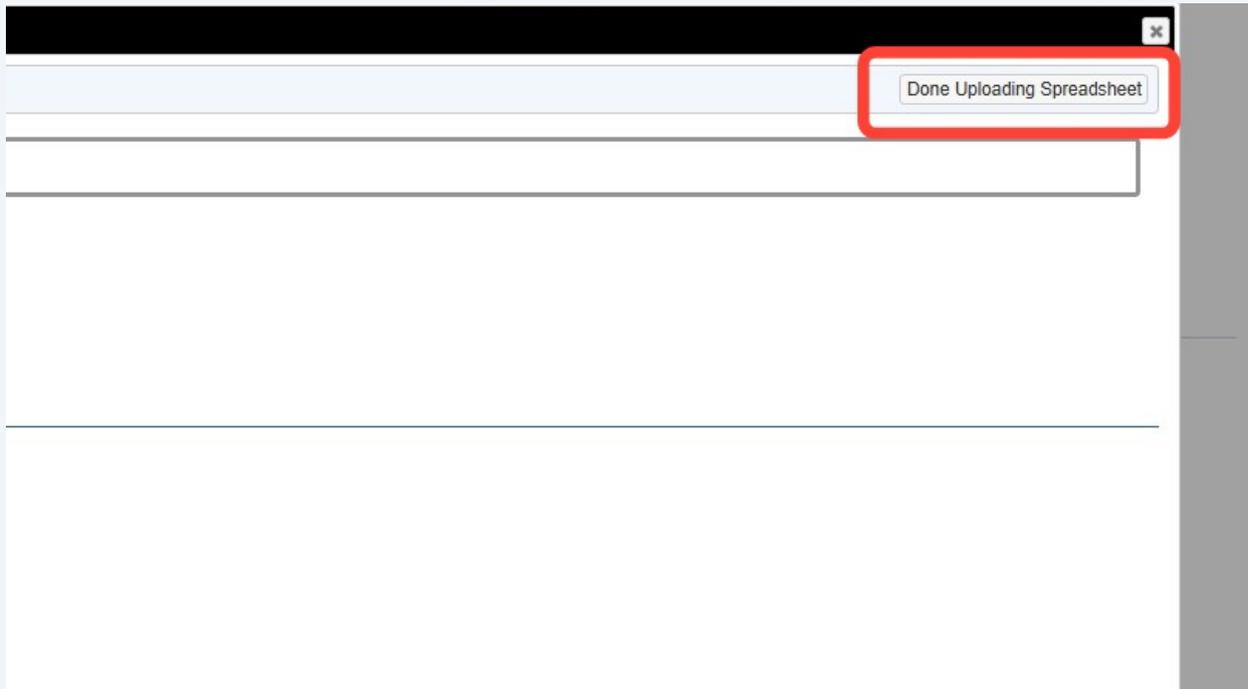
Import spreadsheet (.xls or .xlsx)

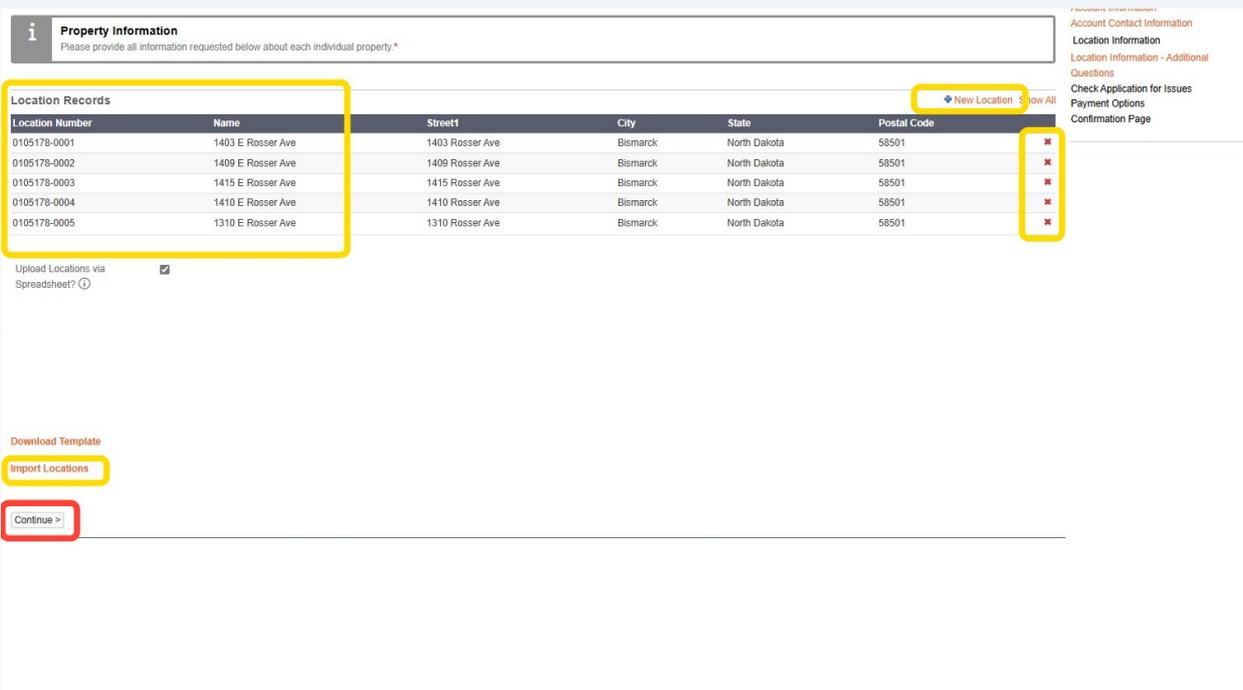Choose File Diagon Alley Properties SOV test loc2.xlsx

Uploading...

Uploading and importing... Please wait.
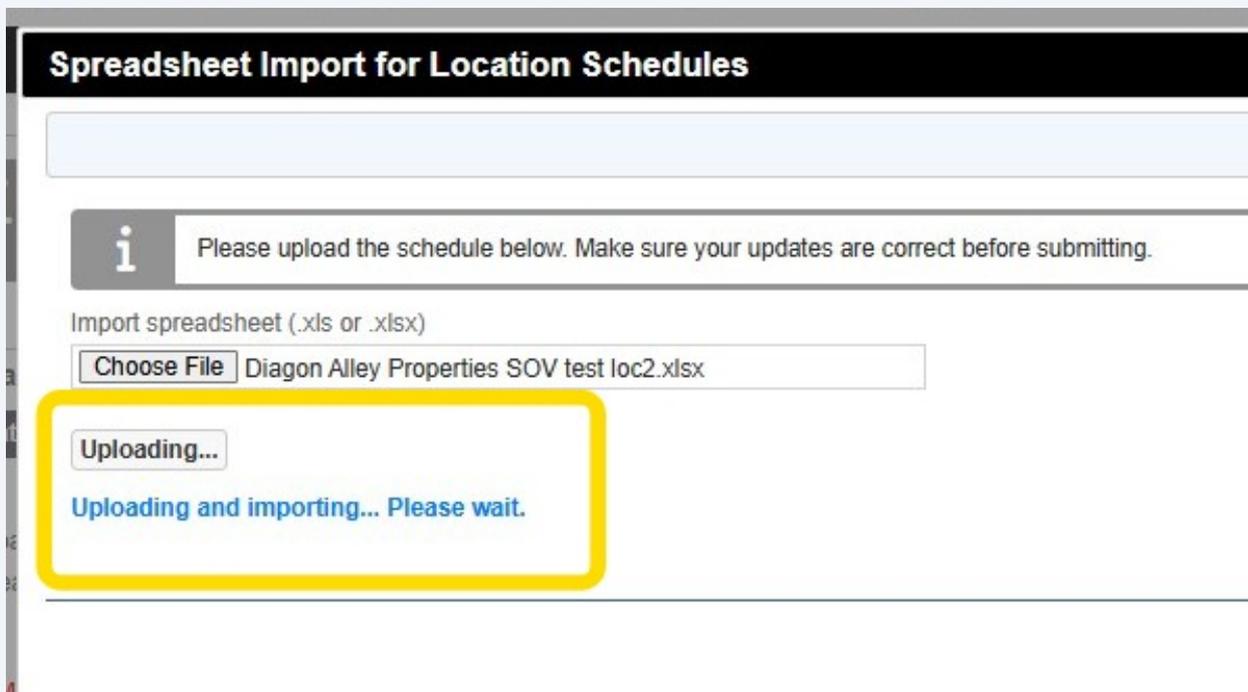
9 When upload is complete, click "Done Uploading Spreadsheet".

Done Uploading Spreadsheet

10 Now you should see each location added from the spreadsheet on this screen. If you need to add more or remove some, you can do that from this page. If you would like to use the spreadsheet to add more locations you can do so by following the same steps. When all looks well, click "Continue".

Property Information
Please provide all information requested below about each individual property.*

Account Information
Account Contact Information
Location Information
Location Information - Additional Questions
Check Application for Issues
Payment Options
Confirmation Page

Location Records   + New Location Show All

Location Number	Name	Street1	City	State	Postal Code	
0105178-0001	1403 E Rosser Ave	1403 Rosser Ave	Bismarck	North Dakota	58501	✖
0105178-0002	1409 E Rosser Ave	1409 Rosser Ave	Bismarck	North Dakota	58501	✖
0105178-0003	1415 E Rosser Ave	1415 Rosser Ave	Bismarck	North Dakota	58501	✖
0105178-0004	1410 E Rosser Ave	1410 Rosser Ave	Bismarck	North Dakota	58501	✖
0105178-0005	1310 E Rosser Ave	1310 Rosser Ave	Bismarck	North Dakota	58501	✖

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Spreadsheet? ⓘ

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Continue >

11 To validate and rate each location you will need to click into each location number. Do not Continue past this page until each location has a green bar next to it under "Information Updated".

12 Click into each Location Number.

13 Click "Save Changes" .

14 If you missed a required question in the spreadsheet or if you need to add a Location Contact, you will get an error message at the top of the screen. Click on the error message for it to take you to the missing information. Update the required missing information and then click "Save Changes" again.

15 Once each location has the green bar next to it then you can click "Continue" to proceed with your proposal.

ⓘ **Property Information**
Please UPDATE all information requested below about each individual property.*

Location Records

Information Updated	Location Number	Name	Payment Option	Street1	City
✓	0105178-0001	1403 E Rosser Ave	Insured Monthly	1403 Rosser Ave	Bismarck
	0105178-0002	1409 E Rosser Ave		1409 Rosser Ave	Bismarck
	0105178-0003	1415 E Rosser Ave		1415 Rosser Ave	Bismarck
	0105178-0004	1410 E Rosser Ave		1410 Rosser Ave	Bismarck
	0105178-0005	1310 E Rosser Ave		1310 Rosser Ave	Bismarck

Continue >